Campus Dining Master Plan Update

E18053.001 – Campus Dining Master Plan

May 22, 2019

Content

- Methodology

- Key Findings

- Potential Strategies

Methodology

Initial Research and Campus Research
January 2019

Gathering relevant data needed for the study, site visit to conduct focus groups and stakeholder interviews, observe and assess current dining facilities.

Market Research Assessment
February 2019

Online survey to determine student, faculty/staff current and future dining needs and peer benchmarking on up to 10 institutions.

Situational Analysis
April 2019

Analysis and assessment of the data received to identify opportunities or strategic repositioning of dining services, identify gaps between current and desired services and understand capacities relative to future demand.

Campus Dining Master Plan Recommendations
June 2019

Strategic initiatives for the next 5-10 years or residential dining, retail dining, catering, and meal plans including order-of-magnitude cost estimates and phasing plan.
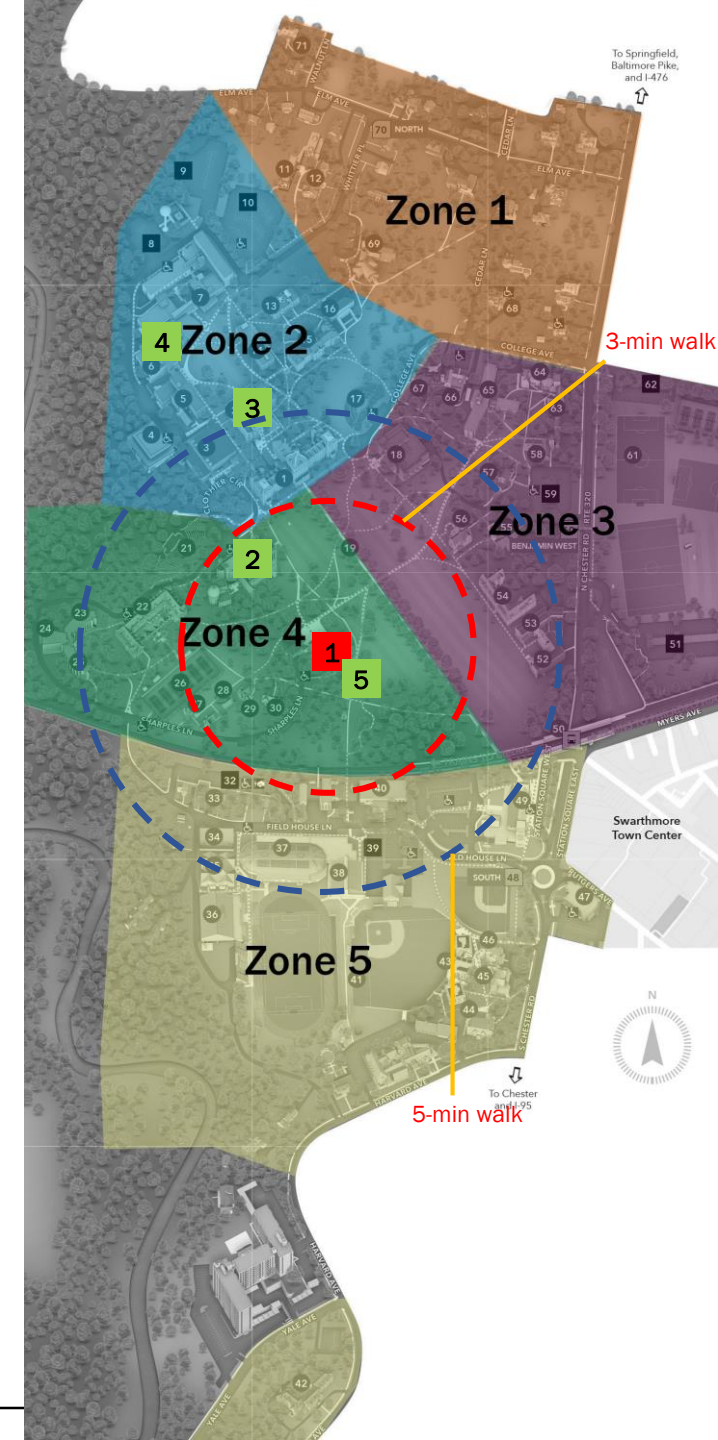
Key Findings
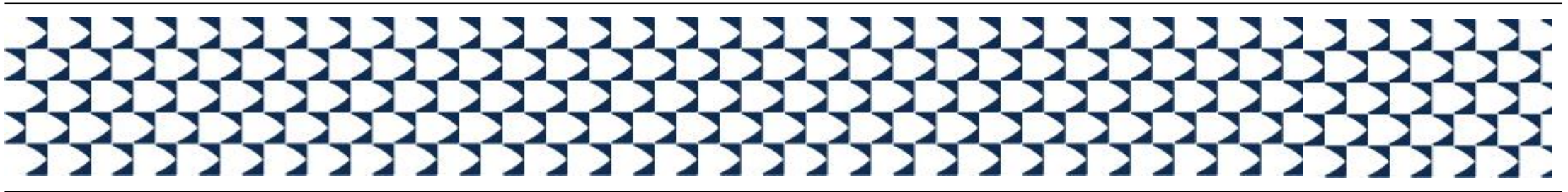
Key Findings/Map Key

Zones	Buildings *(list of some buildings within each zone)*	Dining Venue *(dining within each zone)*
1	Whittier Hall, Lang Center, Robinson House	
2	Science Center, Kohlberg Hall, Parrish Hall, Pearson Hall, LPAC, Dean Bond Rose Garden	Kohlberg Coffee Bar, Science Center Coffee Bar
3	McCabe Library, Cunningham House, Worth Hall, Old Tarble, Mertz Hall, Alice Paul Hall, SEPTA	
4	Sharples Dining Hall, Clothier Hall, Scott Outdoor Amphitheater, Dwell Hall, Women's Resource Center, Faulkner Tennis Courts	Essie Mae's Snack Bar, Sharples Dining Hall, Crumb Café
5	Facilities Management, Title IX House, Mullan Tennis Center, Palmer Hall, The Inn at Swarthmore, Pittenger Hall, Matchbox, Mary Lyon Hall	
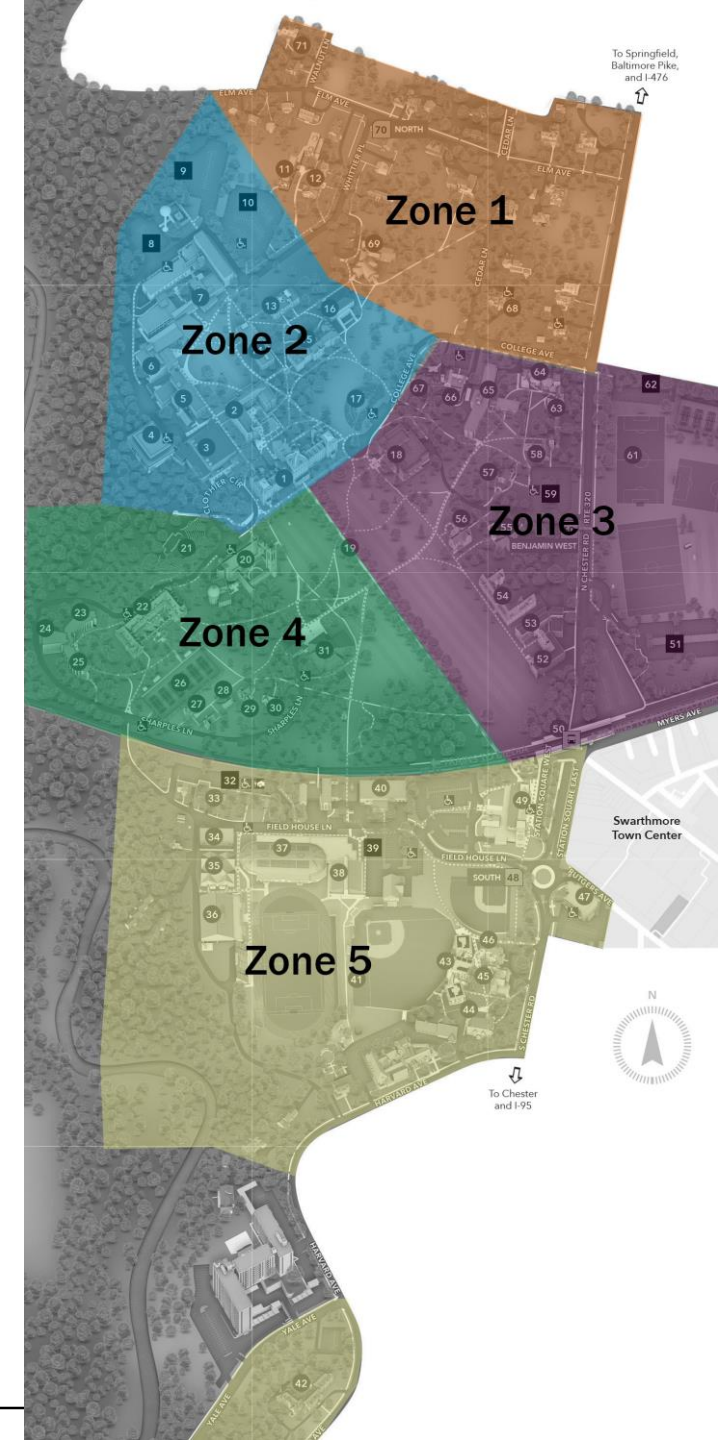
Key Findings/Current Program Overview

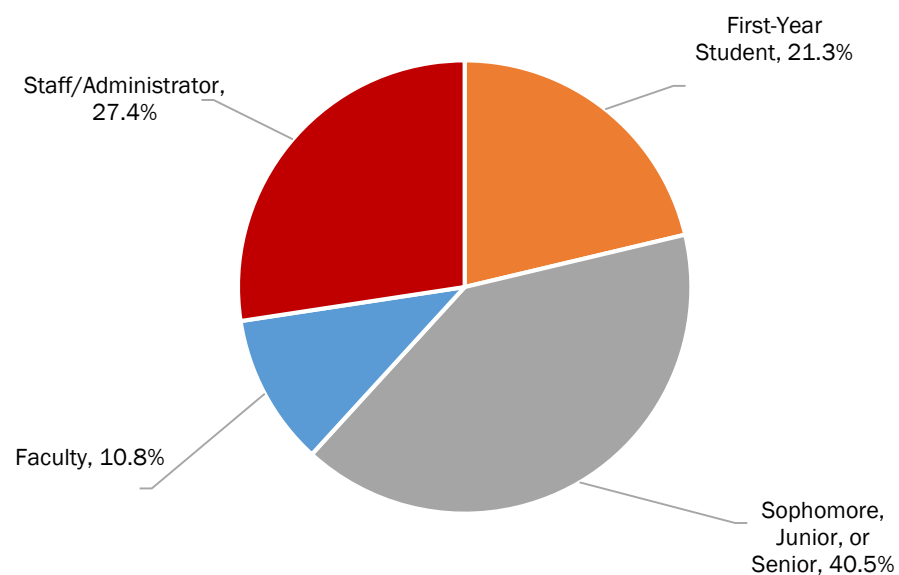| Map Key	Venue Name	Building	Service Format	Hours of Operation
1	Sharples Dining Hall	Sharples Dining Hall	All You Care to Eat	M-F: 7:30a – 8:00p S: 7:30a – 7:00p Su: 10:00a – 7:00p
2	Essie Mae's Snack Bar	Clothier Hall	Marketplace Café	M-F: 8:00a – 10:30p
3	Kohlberg Coffee Bar	Kohlberg Hall	Quick Service - Counter	M-Th: 8:00a – 4:30p F: 8:00a – 2:00p
4	Science Center Coffee Bar	Science Center	Quick Service - Counter	M-Th: 8:00a – Midnight F - Su: 8:00a – 10:00p
5	Crumb Café	Sharples Dining Hall	Quick Service - Counter	M-Su: 9:00p – Midnight

Currently, Swarthmore Dining has one all-you-care-to-eat dining hall and four retail locations. The dining hall is more than a 3-min walk from the academic zone of campus.

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Key Findings/Survey Respondent Characteristics

The survey was live from January 27 – February 4, 2019. There were a total of 573 respondents.

My academic classification is:
(Total Respondents – 573)

- Staff/Administrator, 27.4%
- First-Year Student, 21.3%
- Sophomore, Junior, or Senior, 40.5%
- Faculty, 10.8%

Where do you live?

	On campus	Off campus - within walking/biking/shuttle distance to the campus	Off campus - using my own vehicle or carpool to get to campus	Off campus - using public transportation to get to campus
Total Respondents (573)	57.9%	13.4%	25.1%	3.5%
First-Year Student (122)	95.1%	4.9%	0.0%	0.0%
Sophomore, Junior, or Senior (232)	93.1%	6.5%	0.4%	0.0%
Fac/Staff/Admin (219)	0.0%	25.6%	65.3%	9.1%

Key Findings/Midday Population Distribution (11 a.m. – 2 p.m.)

- Respondents were asked where they are during midday (11 a.m. – 2 p.m.) on a typical weekday.
- 99.1% of the Total Respondents are on campus during midday.
- Zone 2 has the highest percentage of Total Respondents at 67.7%.
- The majority of the sub-samples are in Zone 2.
- Science Center is the most populated building in Zone 2 followed by Kohlberg and Parrish.

Zone 1 5.9%
Zone 2 67.7%
Zone 3 6.5%
Zone 4 8.7%
Zone 5 10.3%
Not on campus 0.9%

Population Distribution Midday (11 a.m. - 2 p.m.)

ENVISION STRATEGIES
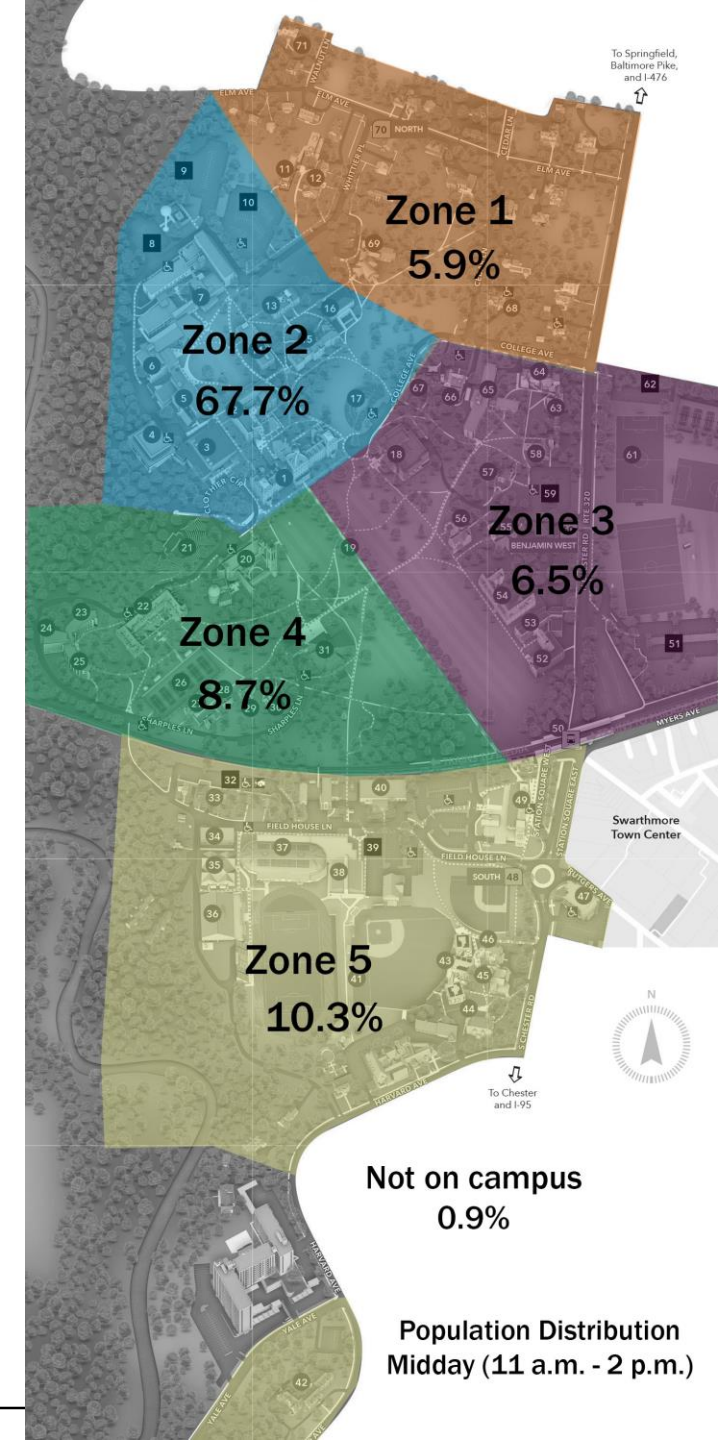
Key Findings/Midday Market Capture (11 a.m. – 2 p.m.)

Those who indicated that they are on campus during midday, the survey asked what they typically do for lunch.

When you are on campus, what do you typically do for your lunch?

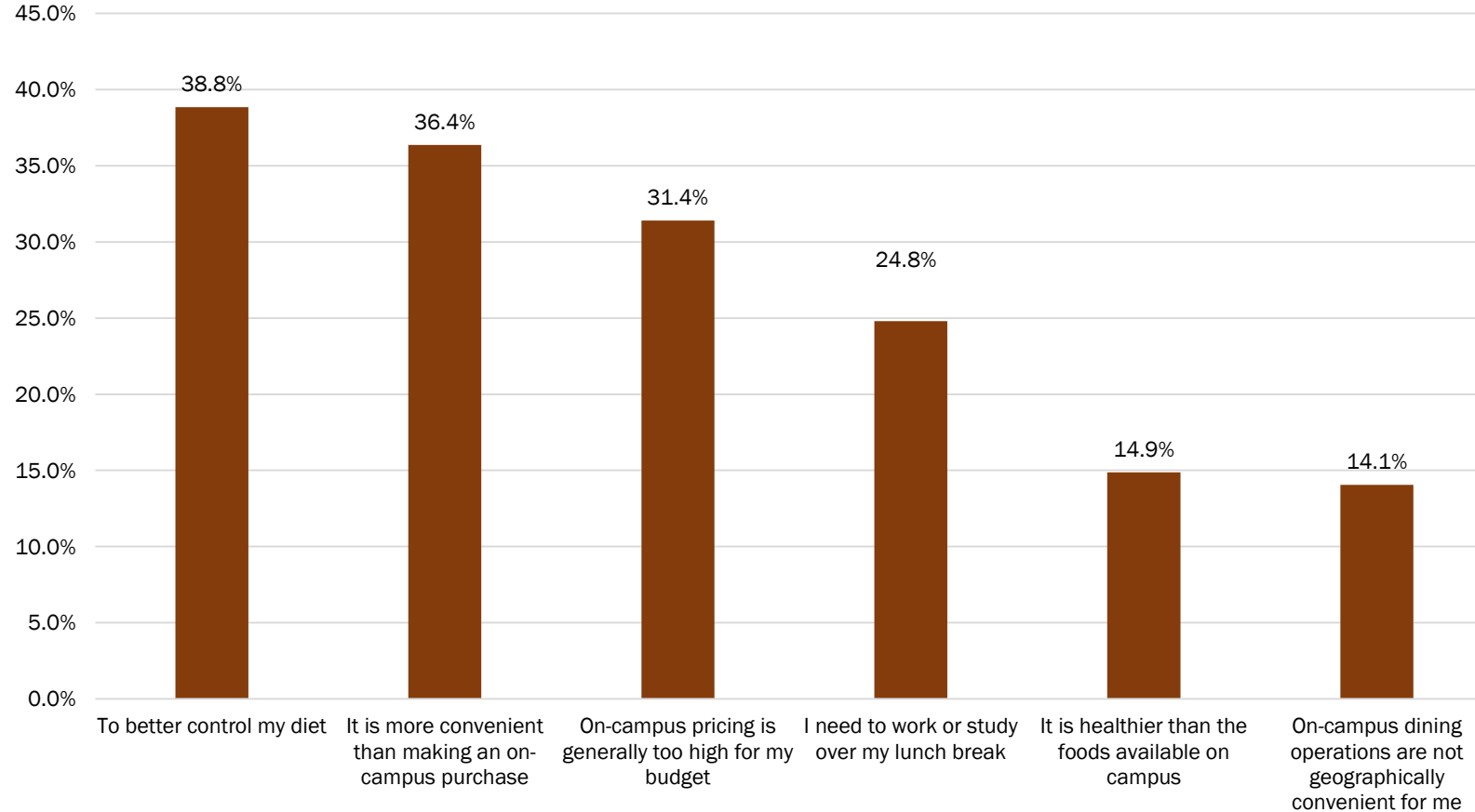|	Skip eating this meal	Prepare and eat at home/residence/ apartment	Bring food from home	Purchase off campus	Eat on campus at Sharples Dining Hall	Purchase elsewhere on campus	Obtain by delivery	Other
Lunch Respondents (568)	4.1%	2.6%	21.3%	3.5%	43.3%	24.3%	0.2%	0.7%
First-Year Student (122)	5.7%	0.8%	0.8%	0.0%	78.7%	13.9%	0.0%	0.0%
Sophomore, Junior, or Senior (232)	4.7%	1.3%	0.0%	1.3%	57.3%	34.9%	0.4%	0.0%
Fac/Staff/Admin (214)	2.3%	5.1%	56.1%	7.9%	7.9%	18.7%	0.0%	1.9%

67.6% of the Lunch Respondents purchase lunch on campus. The opportunity also lies with the 56.1% of the Faculty/Staff who brown bag their lunch.

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8

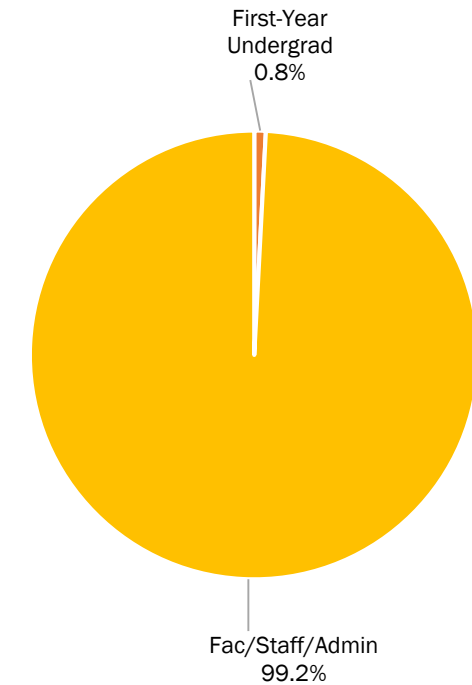# Key Findings/Reasons for Bringing Food from Home

You indicated that you typically bring your lunch from home. Why do you make this choice? Please select your two primary reasons from the list below.
(Respondents - 121)

Campus Affiliation – bring food from home
(Respondents - 121)

Reason	Percentage
To better control my diet	38.8%
It is more convenient than making an on-campus purchase	36.4%
On-campus pricing is generally too high for my budget	31.4%
I need to work or study over my lunch break	24.8%
It is healthier than the foods available on campus	14.9%
On-campus dining operations are not geographically convenient for me	14.1%

Pie chart: First-Year Undergrad 0.8%, Fac/Staff/Admin 99.2%

Diet management and convenience are the biggest drivers of brown bagging.

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Key Findings/Reasons for Eating Lunch at Retail Dining

Those who indicated that they eat at retail dining during midday were asked why they choose to do so. Convenient location and the ability to purchase food "to go" are the top two reasons why they choose retail locations followed by food selection and/or variety.

Why eat at retail dining locations?

- Essie Mae's Snack Bar Respondents (38)
- Kohlberg Coffee Bar Respondents (35)
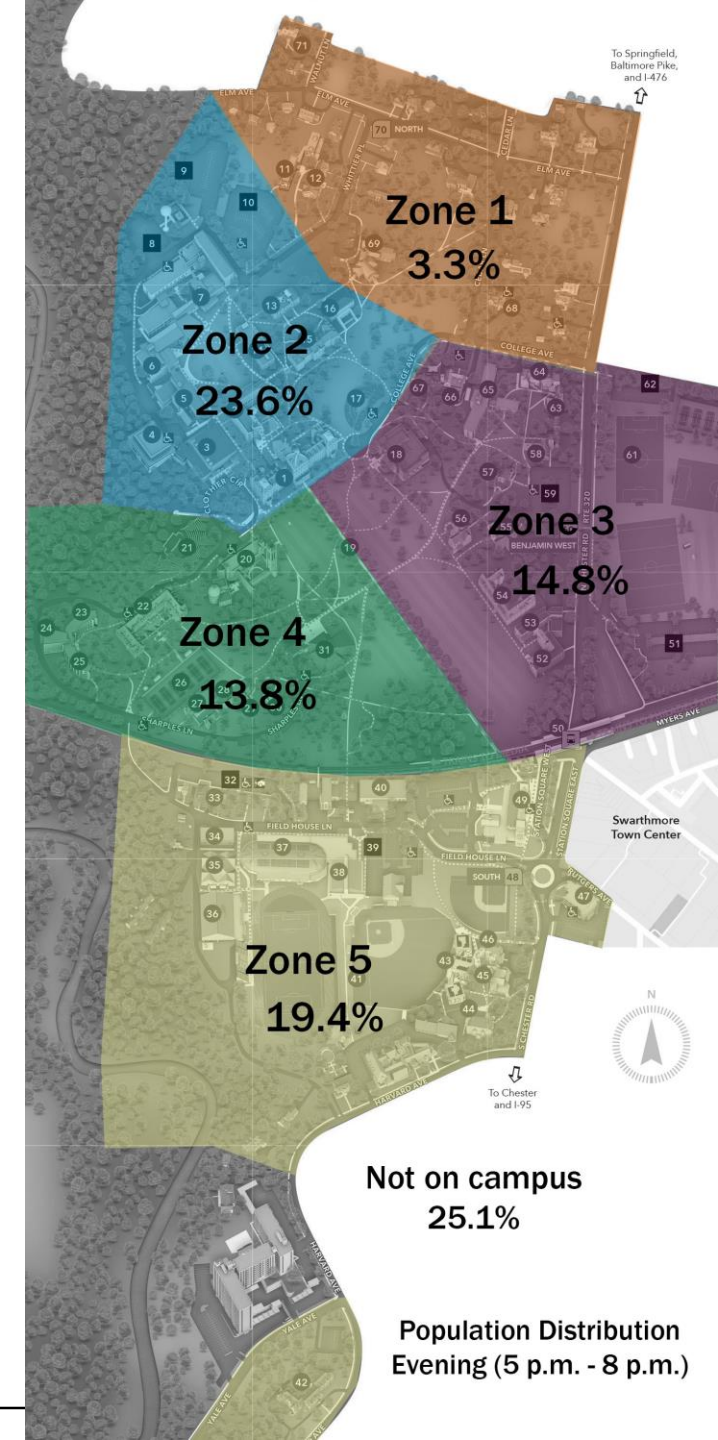- Science Center Coffee Bar Respondents (65)
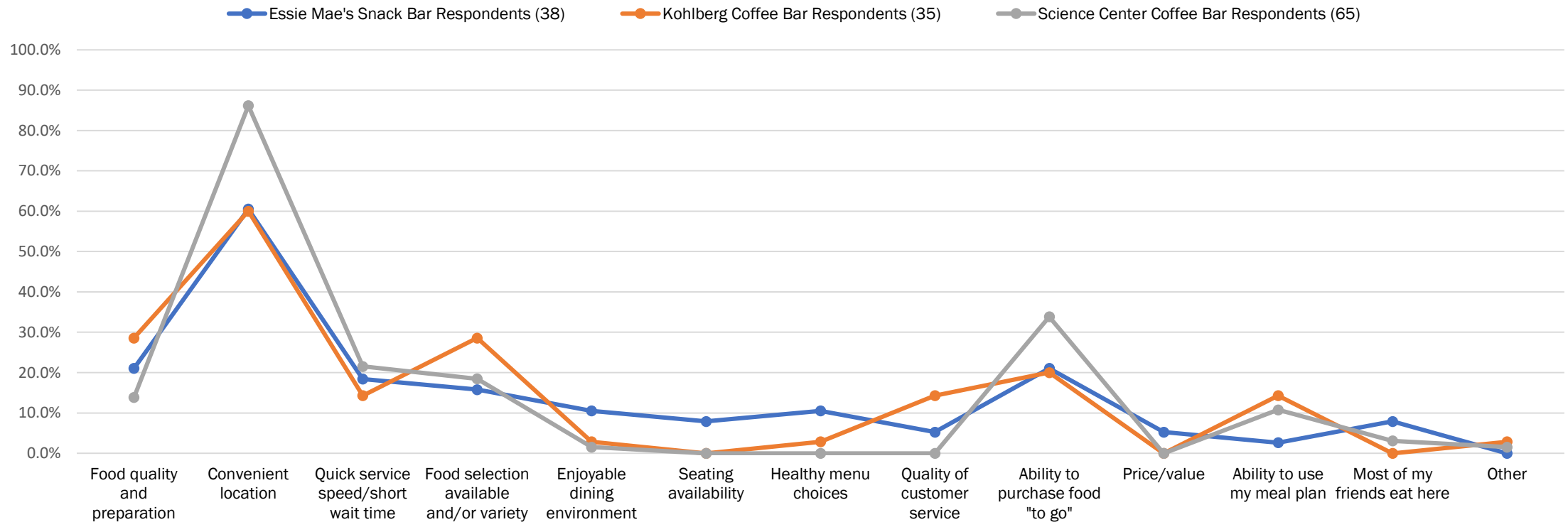
Key Findings/Sharples Dining Hall – Influential Factors

- All Faculty/Staff survey respondents (219) were asked how often they eat at Sharples Dining Hall and what would influence them to eat at this location more.
- 44.3% of the Faculty/Staff/Admin never eat at Sharples Dining Hall, and 31.5% indicated that they eat at least once a semester at this location.
- The top four influential factors to dine at Sharples Dining Hall more often are:
    - Other (27.4%)
    - Price/value (27.4%)
    - Dining environment (27.4%)
    - Seating availability/configuration (23.7%)
- Respondents who indicated "Other" as their most influential factor were asked for further comments. The common responses were:
    - Ease of access since not a student
    - Need for a faculty space
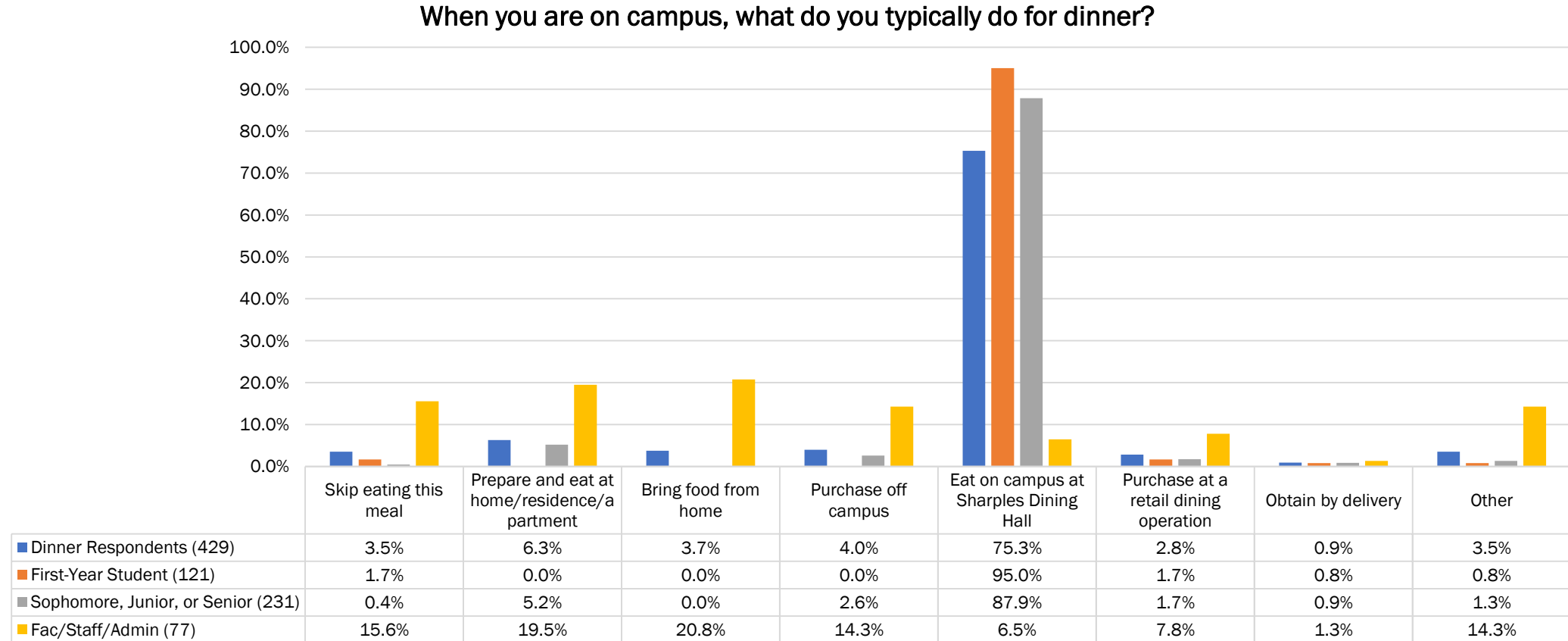   - Distance and convenience at lunch

Key Findings/Evening Population Distribution (5 p.m. – 8 p.m.)

- Respondents were asked where they are during evening (5 – 8 p.m.) on a typical weekday.
- 74.9% of the Total Respondents are on campus in the evening.
- Similar to midday, Zone 2 continues to be the most populated (23.6%), followed by Zone 5 (19.4%), and Zone 3 (14.8%).
- The undergraduates shift towards the residential (Zone 3) and athletic (Zone 5) zones from midday with Zone 3 being the highest for First Year and Zone 2 for Sophomore, Junior, or Senior.
- The majority of the Faculty/Staff have left the campus by this time period.

Zone 1 3.3%

Zone 2 23.6%

Zone 3 14.8%

Zone 4 13.8%

Zone 5 19.4%

Not on campus 25.1%

Population Distribution Evening (5 p.m. - 8 p.m.)

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Key Findings/Evening Market Capture (5 p.m. – 8 p.m.)
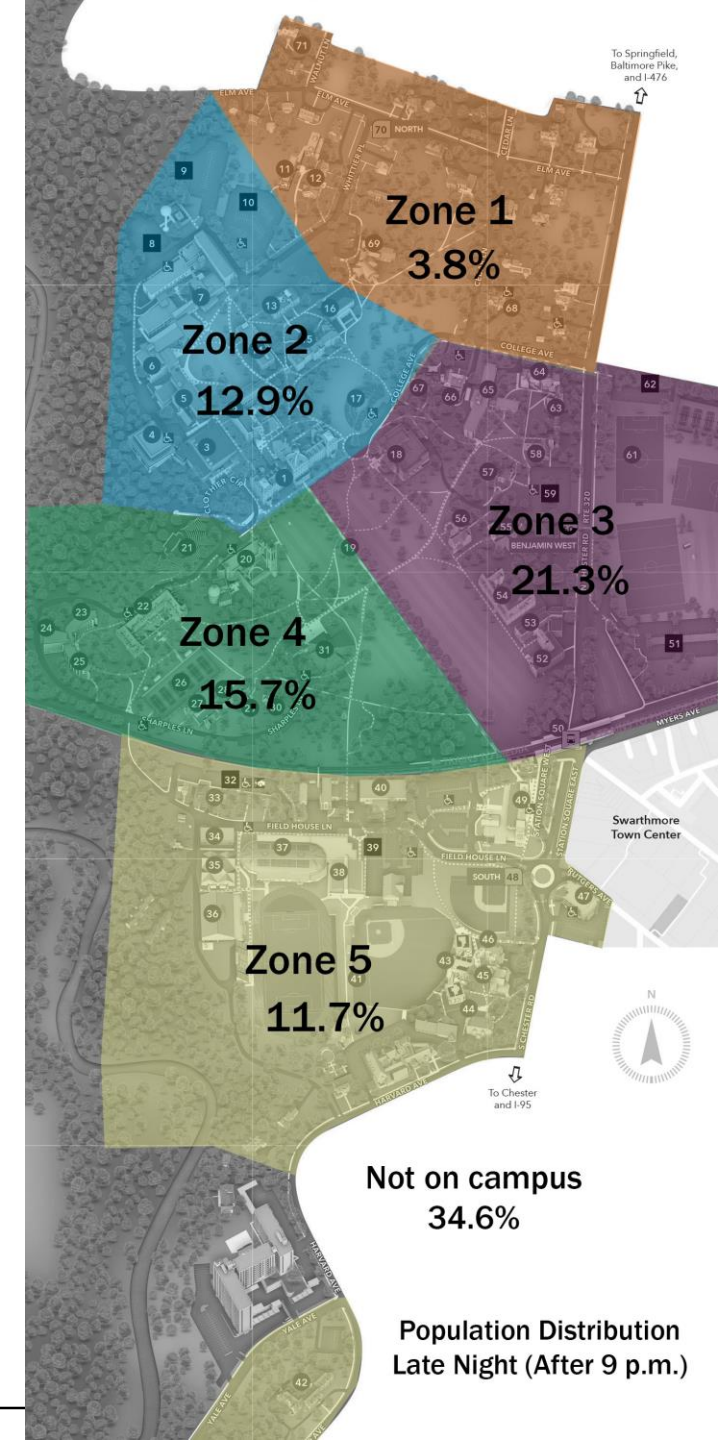
Those who indicated that they are on campus in the evening, the survey asked what they typically do for dinner.

When you are on campus, what do you typically do for dinner?

	Skip eating this meal	Prepare and eat at home/residence/apartment	Bring food from home	Purchase off campus	Eat on campus at Sharples Dining Hall	Purchase at a retail dining operation	Obtain by delivery	Other
Dinner Respondents (429)	3.5%	6.3%	3.7%	4.0%	75.3%	2.8%	0.9%	3.5%
First-Year Student (121)	1.7%	0.0%	0.0%	0.0%	95.0%	1.7%	0.8%	0.8%
Sophomore, Junior, or Senior (231)	0.4%	5.2%	0.0%	2.6%	87.9%	1.7%	0.9%	1.3%
Fac/Staff/Admin (77)	15.6%	19.5%	20.8%	14.3%	6.5%	7.8%	1.3%	14.3%

The majority of the respondents (75.3%) eat at Sharples Dining. Of the respondents who eat at a retail dining operation during this time period, Essie Mae's Snack Bar was the most popular.

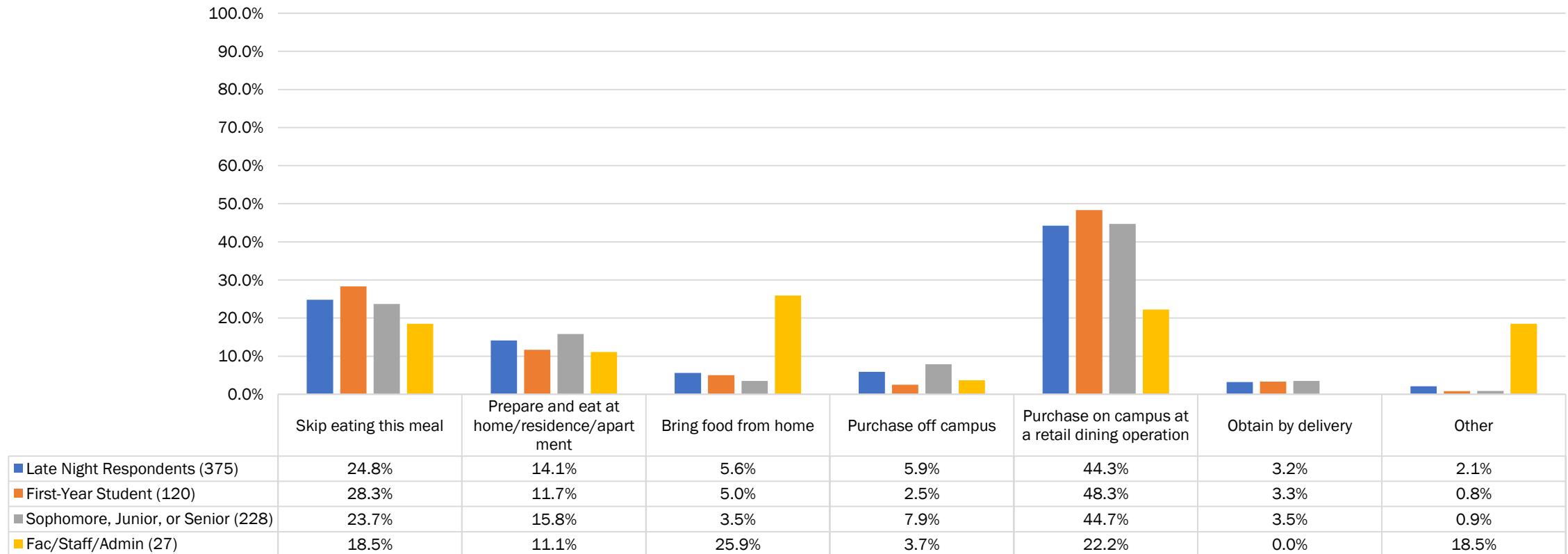# Key Findings/Late Evening Population Distribution (After 9 p.m.)

- Respondents were asked where they are at late evening (after 9 p.m.) on a typical weekday.
- 65.4% of the Total Respondents are on campus after 9 p.m.
- The majority of the student population shifts to Zone 3 which consists of most of the residential halls. This opens up an opportunity to serve late night options within this zone.

Zone 1
3.8%

Zone 2
12.9%

Zone 3
21.3%

Zone 4
15.7%

Zone 5
11.7%

Swarthmore Town Center

Not on campus
34.6%

Population Distribution
Late Night (After 9 p.m.)

Key Findings/Late Evening Market Capture (After 9 p.m.)

Those who indicated that they are on campus late in the evening, the survey asked what they typically do for a meal.

When you are on campus, what do you typically do for a late-night meal or snack?

	Skip eating this meal	Prepare and eat at home/residence/apartment	Bring food from home	Purchase off campus	Purchase on campus at a retail dining operation	Obtain by delivery	Other
Late Night Respondents (375)	24.8%	14.1%	5.6%	5.9%	44.3%	3.2%	2.1%
First-Year Student (120)	28.3%	11.7%	5.0%	2.5%	48.3%	3.3%	0.8%
Sophomore, Junior, or Senior (228)	23.7%	15.8%	3.5%	7.9%	44.7%	3.5%	0.9%
Fac/Staff/Admin (27)	18.5%	11.1%	25.9%	3.7%	22.2%	0.0%	18.5%

It is interesting to note that 44.3% of the late night respondents are continuing to dine after 9 p.m. mostly at Essie Mae's and Crumb Café.

Key Findings/Importance Factors

Importance Attributes	Total Respondents (573)
It is within walking distance at meal time	4.4
I am able to order, receive, and pay for food quickly	4.2
The pricing is fair/provides good value for the money	4.1
It serves a wide variety of food offerings at one location	4.0
I can purchase food "to go" if I desire	3.9
I can use my meal plan or Dining Dollars or Swat Points	3.8
It is a place where I can meet and socialize with my friends/colleagues	3.8
It has a comfortable dining environment	3.6
It serves made-to-order food that I can customize to my preferences	3.4
It is a place that offers adequate seating	3.4
It has a commitment to sustainability such as use of compostable materials, managing waste etc.	3.4
It meets my dietary requirements	3.3
Nutritional information for menu items is readily available	2.8
It offers locally grown foods	2.7
It offers organic foods	2.6
Allergen information for menu items is readily available	2.5
It is a locally owned restaurant	2.5
I can order in advance (app, online)	2.3
It is located off campus so that I can take a break from campus	1.9
It is a regional or national brand	1.7

- Survey respondents were asked to rate multiple attributes using a scale of 1 (not important) to 5 (very important) with regard to its importance to them when deciding where to go for a meal.
- The breakdown by sub-sample showed that the ability to use meal plan or Dining Dollars or Swat Points is the most important factor for student respondents in deciding where they go for a meal or snack.

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Key Findings/Dietary Needs

Do you have any special dietary needs? Check all that apply.
(Total Respondents - 573)
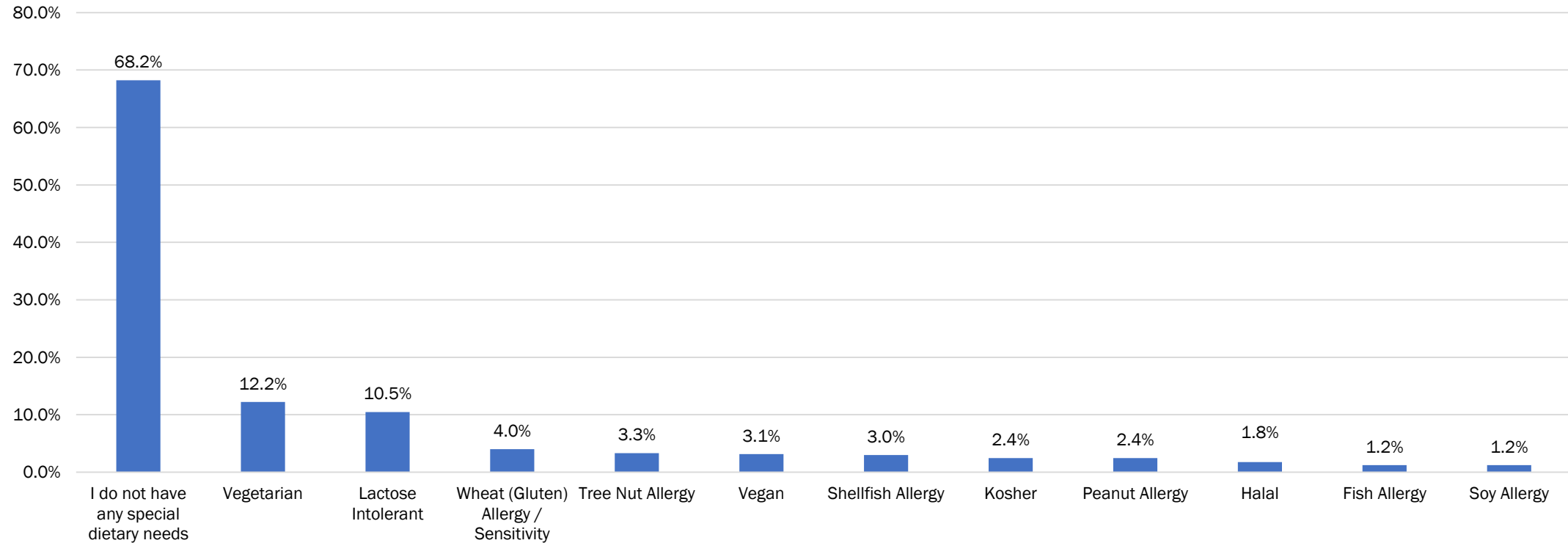
This graph shows that 31.8% of the survey respondents do have special dietary needs with 25.6% with various allergy/sensitivity issues. As the trend for special dietary needs continue to grow, this provides the campus an opportunity to dedicate resources to address this issue.

Key Findings/Meal Plans

- The meal plan structure offers different purchase levels to accommodate the diverse needs of the campus population, and provides sufficient financial support to the dining program while meeting the value expectations.

- Survey results indicated that in addition to having Dining Dollars bundled with plans, the equivalency at Crumb Café and exchange at Essie Mae's are very important to students.

- As part of the programmatic mission, there is a need for the meal plans to be used at some of the off-campus locations such as the Co-op etc.

- Focus groups indicated that there may be an opportunity among faculty and staff to increase the purchase of smaller meal plans provided there is value and seating space available at the new Sharples Dining.

- Benchmarking data shows that while peer schools have a variety of plans, the pricing is quite varied - between $3,100 - $4,000 per semester for Unlimited plans

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Key Findings/Service Hours

Tuesday	a.m.					p.m.												a.m.		
	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2
Sharples Dining Hall	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓							
Essie Mae's Snack Bar		▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓		▓	▓ 10:30 PM				
Kohlberg Coffee Bar		▓	▓	▓	▓	▓	▓	▓	▓	4:30 PM										
Science Center Coffee Bar		▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓		▓	▓	▓			
Crumb Café															▓	▓	▓			

Sunday	a.m.					p.m.												a.m.		
	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2
Sharples Dining Hall				▓	▓	▓	▓	▓	▓	▓	▓	▓								
Essie Mae's Snack Bar																				
Kohlberg Coffee Bar																				
Science Center Coffee Bar		▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓				
Crumb Café															▓	▓	▓			

- The table above shows the existing hours of operation of all the dining locations on campus on a typical weekday and weekend.
- There is a clear need for weekend dining options. According to the survey, respondents rated weekend service hours as one of the top three improvements needed for dining services.

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Key Findings/Wellness and Sustainability

- Although Dining Services demonstrates a strong commitment to healthy practices in recipe development and food preparation, an emphasis on healthy food options was rated as the highest priority as indicated by the survey respondents.

- There is an opportunity to improve communications about special dietary needs and nutrition including allergen labeling.

- Dining Services does an excellent job in promoting sustainability among students, which includes recycling, partnerships, and waste reduction practices. There is potential to increase interaction among students and communicating these stories among the campus community.
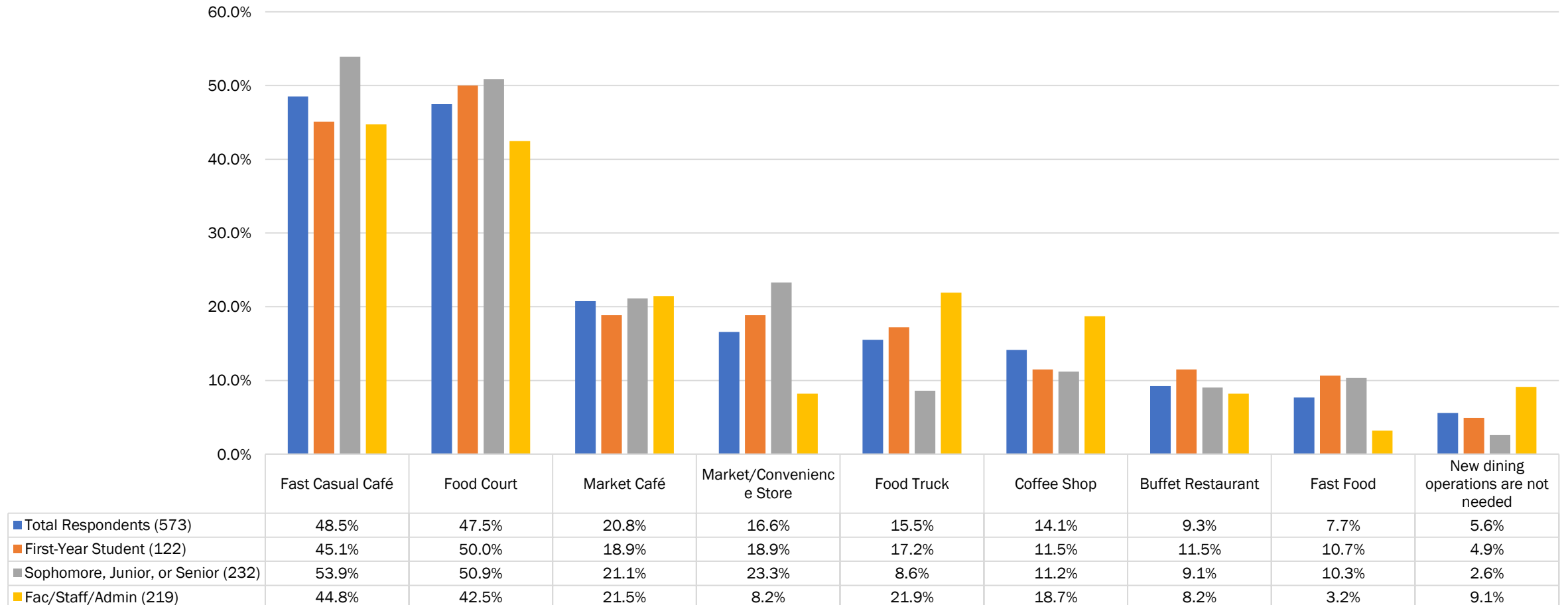
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Key Findings/Marketing and Communication

- The dining website is very user-friendly. However, there is a need for Dining Services to be able to communicate about meals, specials and other important information by using social media and other traditional methods.

- Dining Services should also interact with students on a more consistent basis using surveys and other methods of keeping in touch.

- Opportunities also exist to enhance the Dining Services program by creating brand standards for each dining location on campus.

- To ensure consistent and timely communication to the campus community about the successes of the program, partnerships etc., we suggest creating an annual communication plan for the department that includes a regular schedule of communications.
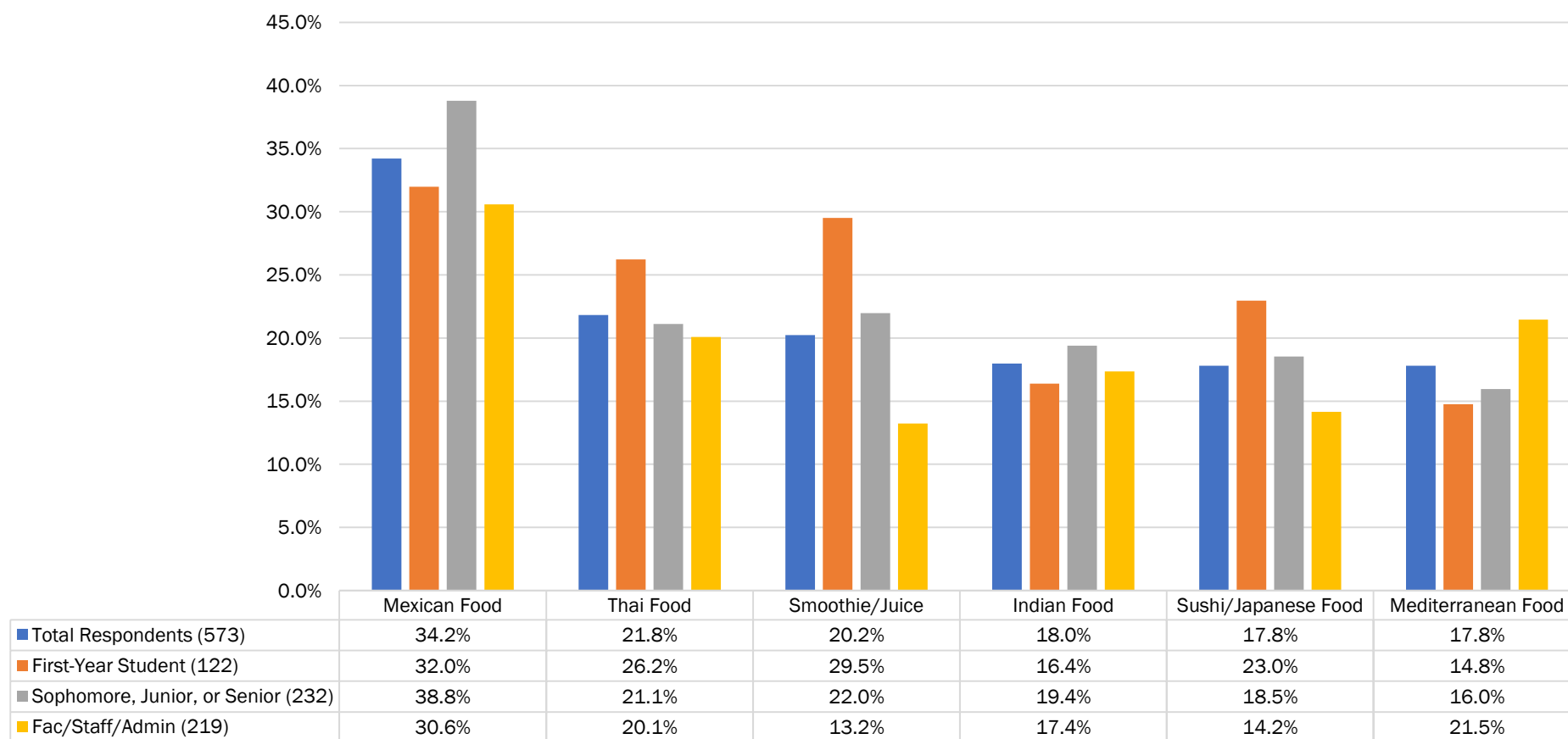

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Key Findings/Preferred New Dining Operation – Service Type

If the College were to add or change retail dining options, what type of service would best meet your needs? Choose up to two responses.
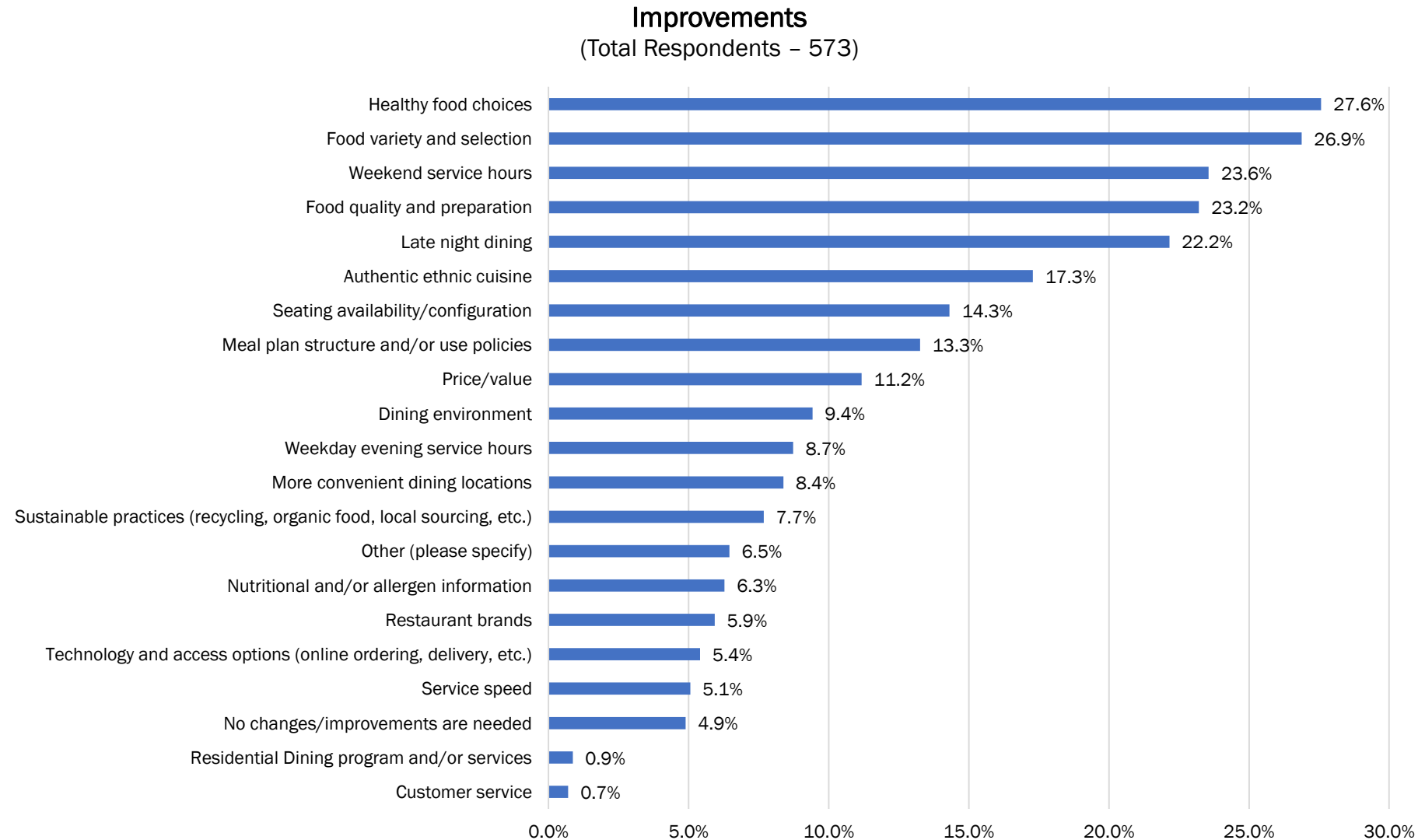

	Fast Casual Café	Food Court	Market Café	Market/Convenience Store	Food Truck	Coffee Shop	Buffet Restaurant	Fast Food	New dining operations are not needed
■ Total Respondents (573)	48.5%	47.5%	20.8%	16.6%	15.5%	14.1%	9.3%	7.7%	5.6%
■ First-Year Student (122)	45.1%	50.0%	18.9%	18.9%	17.2%	11.5%	11.5%	10.7%	4.9%
■ Sophomore, Junior, or Senior (232)	53.9%	50.9%	21.1%	23.3%	8.6%	11.2%	9.1%	10.3%	2.6%
■ Fac/Staff/Admin (219)	44.8%	42.5%	21.5%	8.2%	21.9%	18.7%	8.2%	3.2%	9.1%

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If the College were to add or change some of the food options available on campus, which food types would you most prefer? Select up to three categories.

	Mexican Food	Thai Food	Smoothie/Juice	Indian Food	Sushi/Japanese Food	Mediterranean Food
Total Respondents (573)	34.2%	21.8%	20.2%	18.0%	17.8%	17.8%
First-Year Student (122)	32.0%	26.2%	29.5%	16.4%	23.0%	14.8%
Sophomore, Junior, or Senior (232)	38.8%	21.1%	22.0%	19.4%	18.5%	16.0%
Fac/Staff/Admin (219)	30.6%	20.1%	13.2%	17.4%	14.2%	21.5%

Key Findings/Desired Improvements

Survey respondents were asked what improvement they would like to see made by Dining Services.

Improvements
(Total Respondents – 573)

Improvement	Percentage
Healthy food choices	27.6%
Food variety and selection	26.9%
Weekend service hours	23.6%
Food quality and preparation	23.2%
Late night dining	22.2%
Authentic ethnic cuisine	17.3%
Seating availability/configuration	14.3%
Meal plan structure and/or use policies	13.3%
Price/value	11.2%
Dining environment	9.4%
Weekday evening service hours	8.7%
More convenient dining locations	8.4%
Sustainable practices (recycling, organic food, local sourcing, etc.)	7.7%
Other (please specify)	6.5%
Nutritional and/or allergen information	6.3%
Restaurant brands	5.9%
Technology and access options (online ordering, delivery, etc.)	5.4%
Service speed	5.1%
No changes/improvements are needed	4.9%
Residential Dining program and/or services	0.9%
Customer service	0.7%

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Key Findings/Focus Group and Interview Participants

As part of the first phase, focus groups and interviews were held on campus over three days with the following groups and/or individuals. Each focus group had between 5 – 12 participants.

- Focus Groups:
  - Student Engagement and Residential Life
  - Athletics' Office
  - Dean's Office
  - Facilities and Capital Planning
  - Swarthmore Dining Team (2)
  - Faculty/Staff
  - Students (2)
  - Student Group Leaders
  - Modern Language and Honors Group
  - Catering Arrangers
  - Sustainability Office
  - Admissions Office

- Interviews:
  - Jim Terhune, Interim Dean of Students
  - Greg Brown, VP for Finance and Administration

The next slides show common themes for each dining topic that emerged during these meetings. This was also instrumental in drafting a customized online survey for more qualitative data.

Key Findings/Focus Group Themes

- Quality/Variety:
    - Quality is good at Sharples but menu gets repetitive very quick
    - Seeking more healthy options
    - Very high population of international students so need more authentic ethnic options
    - Indian and Chinese options at the satellite units offers a good alternative to typical café fare
    - The take-out option at Sharples is valued; time-saver and alternative when Sharples is crowded
    - Would like to see more sustainable food options

- Mix of Services:
    - Need for a relaxing, after-hour space such as a pub
    - More group and study spaces with food as an option like the Science Center Coffee Bar
    - With BEP building opening soon, there is a need to provide more food options in or close to the Science Center
    - Need for an option at the McCabe Library; students are there long hours and late at night

- Service Hours:
    - Hours are convenient during the day but would like to see better late-night options
    - Athletes would like longer hours of operations to fit in with their practice times

Key Findings/Focus Group Themes

- Meal Plans:
  - Very convenient to use even off campus
  - Several students expressed satisfaction with the value of the meal plans

- Catering:
  - Relationship and service is much better than what it used to be
  - Expensive as compared to off-campus options

- Facilities
  - Need better ambiance at Sharples
  - Sharples feels like a student-owned space; less welcoming to faculty and staff
  - Faculty and staff would like a separate space within Sharples to dine
  - Kohlberg is a good option but space constraint makes it difficult to serve customers efficiently
  - Athletes would like fueling stations around campus

- Other:
  - Dining staff are a "safety net for students"
  - Community is a very important feature on this campus
  - Need for communicating about dietary and nutritional needs
  - Partnership with the food farm on campus is very important

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Potential Strategies
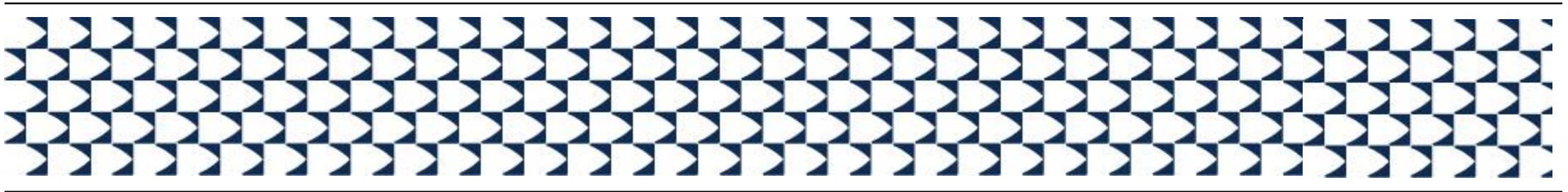
Potential Strategies/Guiding Principles

Based on the findings and analysis of the current dining operations, the team is proposing potential directions and strategies that will pave way for the final dining master plan recommendations.

- Following a visioning session in 2017, the Swarthmore Dining team developed their vision, mission and values that helped guide their role within the College community.
  - Vision: Dining Services will be a cornerstone of Swarthmore College. This is achieved through innovation, stewardship and professionalism and by providing superior customer service and culinary excellence while fostering community and modeling Swarthmore core values.
  - Mission: Dining Services is a diverse team of employees who provide nourishment to the mind, body and well-being of the Swarthmore College community.
  - Values: Sustainable Practices, Local Food Purchasing, Respectful Workplace, Trust, Customer Service, Quality, Teamwork, Professionalism, Diversity, Innovation

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Potential Strategies/Guiding Principles

- The 2013 Campus Master Plan highlights four guiding principles that helped inform the master planning effort – *Connect, Sustain, Innovate* and *Cultivate.* Based on the discussion at the planning sessions with the dining team, we propose organizing the values as follows
  - Connect – community, customer service
  - Sustain – sustainable practices, financial
  - Innovate – wellness, convenience, quality
  - Cultivate – teamwork, staff development

Potential Strategies/#1 – Sharples Dining

- Current dinner demand suggests a need for 796 seats which indicates a seating deficiency of 154 seats.

- Four alternative scenarios were identified while analyzing projected dinner demand:
  - A: If seating efficiency is at 80% (current seating efficiency is at 92%)
  - B: If student enrollment increased at 20 students/year
  - C: If retail improvements and meal plan changes were made (which could possibly shift traffic away from Sharples Dining)
  - D: If enrollment growth at 20 student/year is lower by 15%

- Nine Key Service Platforms
  - Grill/Pizza
  - Comfort Food
  - Mediterranean/Asian
  - Mexican/Latin
  - Teaching Kitchen/Chef's Table
  - Allergen-free Zone
  - Salad/Soup/Deli
  - Bakery/Desserts
  - Vegetarian/Vegan

- Campus Bakery

- Catering headquarters

- Dining team headquarters

Potential Strategies/#2 – Mix and Distribution of Retail Locations

In addition to the expansion of Sharples, the College will need to re-evaluate its current retail dining options, and consider possible consolidations or relocations in order to serve the campus community.

Current locations:

- Science Center Coffee Bar

- Essie Mae's Snack Bar

- Crumb Café

- Kohlberg Coffee Bar

Future possibilities for consolidated or relocated retail dining locations:

- New Commons Area

- McCabe Library

- Athletic Zone

ENVISION STRATEGIES

Potential Strategies/#3 – Other

1. Need for weekend retail options and longer hours

2. Meal plan change based on master plan

3. Catering
   - Tiers of service
   - Increase market share for larger events as assessment indicated preference for off-campus catering

4. Need for nutritionist to help elevate the healthy options program

5. Marketing and communications
   - Need to increase Dining Services' presence and identity among the campus community by continuing to partner with the College's Communications Office.
   - Comprehensive marketing plan with goals, strategies and budgets.
   - Develop overall Dining Services brand.
   - Branding and merchandising of all locations to stay consistent.

ENVISION
STRATEGIES